



Oceanview Life and Annuity Company  
Oceanview Life and Annuity Insurance Company  
PO Box 830 Grimes, IA 50111-0830  
Tel 888.295.3815 • Fax 888.417.3702 • [www.oceanviewlife.com](http://www.oceanviewlife.com)

## Transfer of Values Form

Contract Number: \_\_\_\_\_

Contract Owner Name: \_\_\_\_\_

Joint Contract Owner's Name: \_\_\_\_\_

**IF YOU ARE SATISFIED WITH YOUR CURRENT CREDITING STRATEGY ALLOCATIONS, YOU DO NOT NEED TO DO ANYTHING FURTHER**

I/We wish to allocate my/our annuity Contract Value as follows:

<u>Crediting Strategies</u>	<u>Percentage</u>
Fixed Value	_____
S&P 500 Annual Point to Point w/Cap	_____
S&P 500 Annual Point to Point w/Participation Rate	_____
S&P 500 2 Year Point to Point w/Participation Rate	_____
S&P 500 Monthly Average w/Cap	_____
Credit Suisse Retiree Balanced Annual Point to Point w/ Participation Rate	_____
Credit Suisse Retiree Balanced 2 Year Point to Point w/ Participation Rate	_____
Nasdaq-100® Annual PTP w/ Cap	_____
Russell 2000® Annual PTP w/ Cap	_____
<b>Total: (Percentages must be whole numbers and total 100%)</b>	<b>100%</b>

Allocations are subject to a \$200 minimum to maintain a Value.

**TRANSFER OF VALUES REQUEST MUST BE RECEIVED NO LATER THAN THE CONTRACT ANNIVERSARY DATE. REQUESTS RECEIVED AFTER THIS TIME WILL NOT BE HONORED.**

**IF NO CHANGES ARE DESIRED FOR THIS CONTRACT YEAR, IT IS NOT NECESSARY TO SUBMIT A CHANGE REQUEST.**

\_\_\_\_\_  
Contract Owner's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Joint Contract Owner's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Phone Number

***IN ORDER TO ENSURE YOUR REQUEST IS RECEIVED WITHIN THE ALLOTTED TIME FRAME, WE STRONGLY RECOMMEND SUBMITTING YOUR REQUEST VIA FAX OR PHONE 10 BUSINESS DAYS PRIOR TO YOUR CONTRACT ANNIVERSARY.***

***\*A portion of your Current Value may not be Available for Reallocation until your next contract anniversary.***

1- Fax to 1-888-417-3702    2- Call 1-888-295-3815

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